

Download Security Pro Installation and Setup Guide

Version 1.2
April 21, 2023

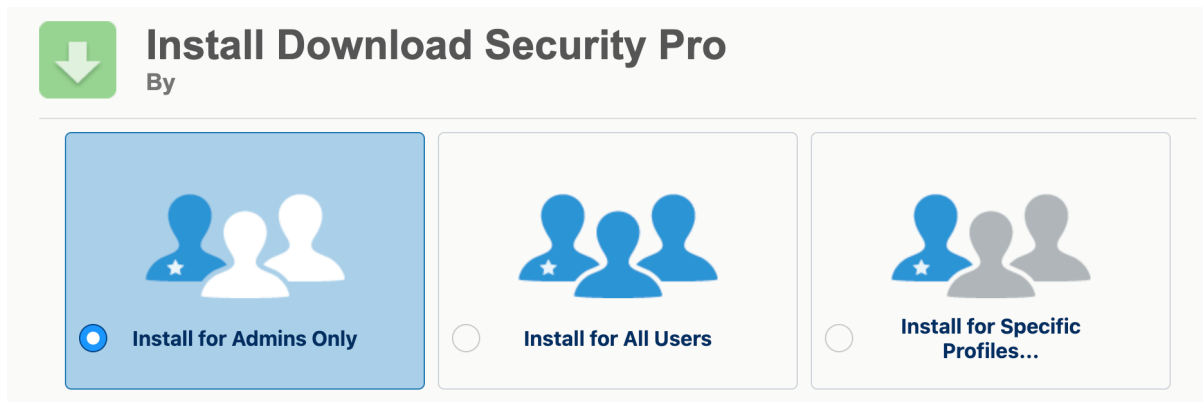


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Installation

Install Download Security Pro directly from the Salesforce AppExchange. Make sure to use the option “Install for Admins Only”.



Setup

Permissions

Assign the Permission Set “Download Security Pro – Administrators” to all System Administrators
Assign the Permission Set “Download Security Pro – User” to ALL Users

Since the application depends on custom object records that will be read by the User, all Users need to have the Permission Set assigned for Download Security Pro to work properly. If a User does not have the Permission Set assigned and tries to download a File, the download will be blocked and a message will be displayed to contact the System Administrator to get the Permission Set assigned.

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) / [Android](#)

AB

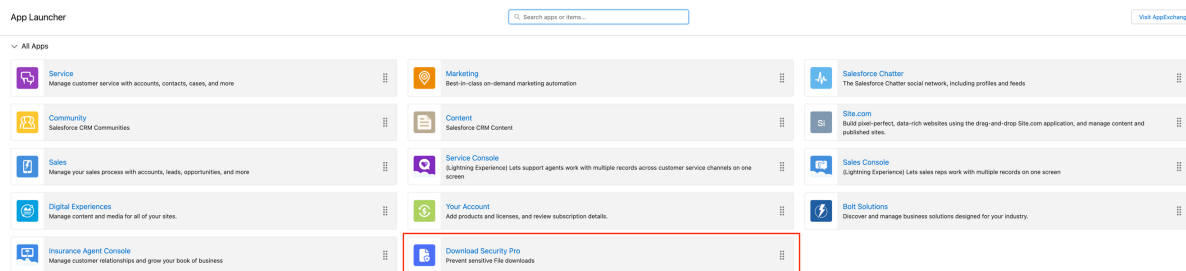
[Edit](#) [Delete](#) [Create New View](#)

New	1,2			
☐	Action	Permission Set Label	Description	License
☐	Clone	CRM Analytics Platform Admin	Create and customize CRM Analytics apps, dashboards, datasets and data flows.	Analytics Platform
☐	Clone	CRM Analytics Platform User	View CRM Analytics apps and dashboards.	Analytics Platform
☐	Clone	CRM Analytics for Sales Cloud	View and manage CRM Analytics for Sales Cloud	Analytics Platform Administration
☐	Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
☐	Clone	Download Security Pro - Administrator	Download Security Pro Permission Set for Administrators.	
☐	Clone	Download Security Pro - User	Download Security Pro Permission Set for Users. All users in the Org should get this permission set assigned in order to be able to track their download permissions	
☐	Clone	FSC Insurance	Enable FSC for Insurance	FSC Insurance
☐	Clone	Financial Services Cloud Extension	Allows the user to access Financial Services Cloud features delivered after Spring '20.	Financial Services Cloud Extension
☐	Clone	Montage	Allows the user to access Montage in Financial Services Cloud.	Montage
☐	Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Salesforce CMS with any endpoint.	Cloud Integration User
☐	Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
☐	Clone	Stack Service User	Lets users run the flows for searwing with Service Cloud for Stack.	Stack Service User
☐	Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
☐	Clone	Trust Card Manager	Lets users create, read, edit, and delete trust measures for their location's trust card. Also lets users preview and copy the trust card code snippet for their location.	Trust Card Manager
☐	Clone	Your Account App Admin User	Manage your Salesforce subscriptions with the Your Account app.	Your Account App

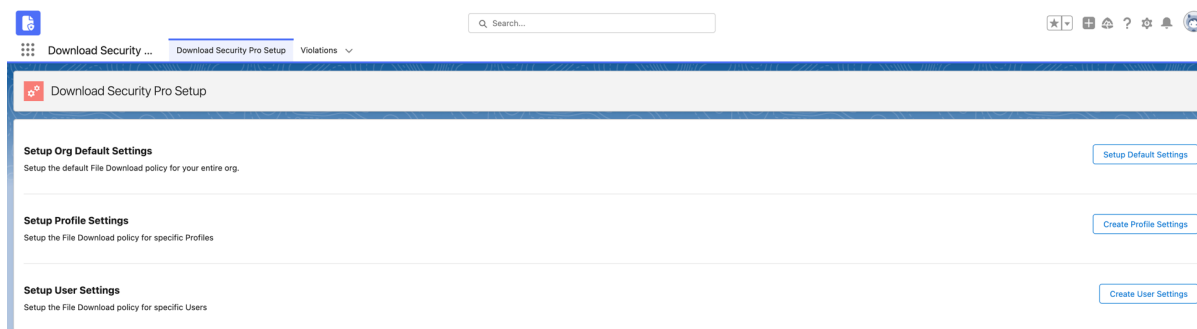
Download Security Pro - Overview

The File Download permissions are set and maintained by the System Administrator. The access to Download Security Pro is handled by the Permission Set “Download Security Pro – System Administrator”.

Open Download Security Pro from the App Launcher:



This will open up the Download Security Pro Settings tab:



In this screen, System Administrators can set the Download permissions for the entire Salesforce Org, or make exceptions to that policy for specific Profiles or Users.

When a File is being downloaded, Download Security Pro check for the most specific settings for the current User. This means, that if there are settings for the current User, those settings will apply. If there are no settings for the current User, Download Security Pro checks if there are settings for the Profile of the current User and uses those settings if they exist. If there are also no settings for the Profile of the current User, Download Security Pro will use the settings for the Salesforce Org.

Download Security Pro does not use inheritance in this hierarchy. So, if a setting on the User level is not set, but there is a setting on the Profile or Org level, Download Security Pro will not use those settings. Instead, only the settings defined on the User level are enforced.

Setting options

The following settings are available to allow or block File Downloads:

- Block all Downloads
- File Size
- IP Address
- File Type

Block all Downloads

In the General Settings screen, the Block all Downloads option can be enabled by toggling the setting. Changes in the setting will be saved immediately.

General Settings for Organization

General Settings

Block all Downloads?

☐

Enable Maximum File Size Filter?

☐

Max File Size Filter disabled

Maximum File Size (in bytes)

Previous

Next

Once activated, all other settings will be hidden, because they no longer apply.

General Settings for Organization

General Settings

Block all Downloads?

☒

All Downloads Blocked

Close

File Size Filter

In the General Settings screen, the File Size filter can be enabled by toggling the setting. Changes in the setting will be saved immediately.

General Settings for Organization

General Settings

Block all Downloads?

☐

Enable Maximum File Size Filter?

☐

Max File Size Filter disabled

Maximum File Size (in bytes)

Previous

Next

If activated, the field to enter the File size will become editable. In this field, enter the File size in bytes. To accommodate the System Administrator, the File Size in KB, MB, GB, etc will be shown as well. Click the Save button to save the Maximum File Size.

General Settings for Organization

General Settings

Enable Maximum File Size Filter?

☒

Max File Size Filter enabled

Maximum File Size (in bytes)

2500000
(2.5 MB)

Save

Previous

Next

In this example, all Files that exceed a size of 2.5MB will be blocked from being downloaded.

Click Next to go to the IP Filter Settings.

IP Address Filter

In this screen, IP Filtering can be enabled. IP Filtering can be used to block or allow File downloads from certain IP ranges. This can be the company network or a specific region in the world.

IP Filter Settings for Organization

IP Filter Settings

Enable IP Filter?

☒

IP Filter disabled

Use IP Filter as blacklist?

☐

IP Filter is allowlist

[Previous](#previous)
[Next](#next)

Enable IP Filtering by toggling the setting “Enable IP Filter?”. This will also enable the “Use IP Filter as blacklist” setting. By default, the IP Filters are used as an allow list. This means that all IP ranges defined will be allowed to download Files from Salesforce. If the User is on a different IP address, the download will be blocked. If the setting “Use IP Filter as blacklist” is enabled, the logic will be inversed and downloads from the defined IP ranges will be blocked.

If the setting “Enable IP Filtering” is turned on, but there are no IP ranges defined, downloads from all IP addresses will be allowed (even if “Use IP Filter as blacklist” is turned on).

IP Filter Settings for Organization

IP Filter Settings

Enable IP Filter?

☒

IP Filter active

Use IP Filter as blacklist?

☐

IP Filter is allowlist

IP Filters (Downloads from these ranges are allowed)

[New](#new)

There are no IP Filters set. This means no filters will be applied.

[Previous](#previous)
[Next](#next)

Click on “New” to define an IP range. This will open a form where the IP range can be entered.
Click “Save” to save the IP range.

IP Filter Settings for Organization

IP Filter Settings

Enable IP Filter?

☒ IP Filter active

Use IP Filter as blacklist?

☐ IP Filter is allowlist

IP Filter details

* Start IP

* End IP

IP Filters (Downloads from these ranges are allowed)

There are no IP Filters set. This means no filters will be applied.



IP Filter Settings for Organization

IP Filter Settings

Enable IP Filter?

☒ IP Filter active

Use IP Filter as blacklist?

☐ IP Filter is allowlist

IP Filters (Downloads from these ranges are allowed)

Name	Start IP	End IP	
IPFILTER-00000	0.0.0.0	0.0.0.1	▼



Here's an example of using the IP ranges as a blacklist:

IP Filter Settings for Organization

IP Filter Settings

Enable IP Filter? ☒ IP Filter active

Use IP Filter as blacklist? ☒ IP Filter is blacklist

IP Filters (Downloads from these ranges are blocked)

New

Name	Start IP	End IP
IPFILTER-00000	0.0.0.0	0.0.0.1

Previous Next

Click "Next" to go to the File Type Filter Settings.

File Type Filter

In this screen, File Type Filtering can be enabled. File Type Filtering can be used to block or allow File downloads for certain File Types (jpg, pdf, xlsx, etc.).

File Type Filter Settings for Organization

File Type Filter Settings

Enable File Type Filter?

☐

File Type Filter disabled

Use File Type Filter as blacklist?

☐

File Type Filter is allowlist

[< Previous](#)
[Next >](#)

Enable File Type Filtering by toggling the setting “Enable File Type Filter?”. This will also enable the “Use File Type Filter as blacklist” setting. By default, the File Type Filters are used as an allow list. This means that all File Types defined will be allowed to be downloaded from Salesforce. If the User tries to download a File of a different type, the download will be blocked. If the setting “Use File Type Filter as blacklist” is enabled, the logic will be inversed and downloading Files of the defined File Types will be blocked.

If the setting “Enable File Type Filtering” is turned on, but there are no File Types defined, downloads from all File Types will be allowed (even if “Use File Type Filter as blacklist” is turned on).

File Type Filter Settings for Organization

File Type Filter Settings

Enable File Type Filter?

☒

File Type Filter active

Use File Type Filter as blacklist?

☐

File Type Filter is allowlist

File Type Filters (Downloads of these File Types are allowed)

[New](#)

There are no File Type Filters set. This means no filters will be applied.

[< Previous](#)
[Next >](#)

Click on “New” to define a File Type. This will open a form where the File Type can be entered. Click “Save” to save the File Type.

File Type Filter Settings for Organization

File Type Filter Settings

Enable File Type Filter?
☒
File Type Filter active

Use File Type Filter as blocklist?
☐
File Type Filter is allowlist

File Type Filter details

File Type

File Type Filters (Downloads of these File Types are allowed)

There are no File Type Filters set. This means no filters will be applied.

File Type Filter Settings for Organization

File Type Filter Settings

Enable File Type Filter?
☒
File Type Filter active

Use File Type Filter as blocklist?
☐
File Type Filter is allowlist

File Type Filters (Downloads of these File Types are allowed)

Name	File Type
FTF-00000	jpg

Here’s an example of using the File Types as a blocklist:

File Type Filter Settings for Organization

File Type Filter Settings

Enable File Type Filter?
☒
File Type Filter active

Use File Type Filter as blocklist?
☒
File Type Filter is blocklist

File Type Filters (Downloads of these File Types are blocked)

Name	File Type
FTF-00000	jpg

Click “Next” to close the wizard. You are now all set and Downloads are now secured according to the settings you’ve made.